

Additional Checklists

Executive Summary

Key Concepts

- Provide a description of the project and expected results. Concentrates on the essence of your project, not all the side issues and ramifications.
- Gives the pertinent contact information.
- Clearly states what you expect of the funder.
- Clearly states what your organization and others are investing in the project.

Checklist*—Executive Summary

<input checked="" type="checkbox"/>	One page
<input checked="" type="checkbox"/>	Heading for each topic
<input checked="" type="checkbox"/>	1. Project title
<input checked="" type="checkbox"/>	2. Contact person information
<input checked="" type="checkbox"/>	3. Applicant information
<input checked="" type="checkbox"/>	4. Mission statement
<input checked="" type="checkbox"/>	5. Problem statement
<input checked="" type="checkbox"/>	6. Project summary
<input checked="" type="checkbox"/>	7. Expected results
<input checked="" type="checkbox"/>	8. Applicant's investment
<input checked="" type="checkbox"/>	9. Funding request

Management Plan

Key Concepts

- Devise an organization chart clearly showing that the project is highly connected in your management structure and is integral in your infrastructure.
- If you have had other successful grants, briefly describe them.
- State how your project will be fiscally managed and audited.
- Indicate the level of expertise in the subject matter of key personnel—you will include biographical data elsewhere in the proposal.
- Briefly give an overview of how the project will be evaluated—you should include a complete evaluation plan in the proposal.
- Briefly give an overview of how the project will be documented, and where the files will reside.

Checklist*—Management Plan

<input checked="" type="checkbox"/>	To whom does the Project Director report?
<input checked="" type="checkbox"/>	Clear lines of responsibility for all project personnel
<input checked="" type="checkbox"/>	Screening, training, and monitoring of volunteers
<input checked="" type="checkbox"/>	Consent and privacy issues
<input checked="" type="checkbox"/>	Security of people and things
<input checked="" type="checkbox"/>	Target population activity documentation
<input checked="" type="checkbox"/>	Financial transaction documentation
<input checked="" type="checkbox"/>	Insurance and liability issues
<input checked="" type="checkbox"/>	Transportation

Documentation Plan

Key Concepts

- When in doubt, document.
- Plan what you will share with other organizations, and write that into proposal.
- Decide how you will distribute information.
- Describe in the proposal what you will document, and what will be sent to the funder.

Checklist*—Documentation Plan

<input checked="" type="checkbox"/>	Staff activities
<input checked="" type="checkbox"/>	Volunteer activities
<input checked="" type="checkbox"/>	Partner activities
<input checked="" type="checkbox"/>	Target population activities
<input checked="" type="checkbox"/>	Financial activities
<input checked="" type="checkbox"/>	Training activities
<input checked="" type="checkbox"/>	Testing activities
<input checked="" type="checkbox"/>	Treatment activities
<input checked="" type="checkbox"/>	Evaluation and assessment activities
<input checked="" type="checkbox"/>	Create necessary information (data) capture documents

Dissemination Plan

Key Concepts

- Realistic but comprehensive—don't promise something you are not willing to do or cannot do.
- Plan dissemination locally, statewide, and nationally.
- Plan the types of information you will share.

Checklist*—Dissemination Plan

<input checked="" type="checkbox"/>	Local presentations at community meetings
<input checked="" type="checkbox"/>	State presentations at conferences, conventions, and meetings
<input checked="" type="checkbox"/>	National presentations at conferences, conventions, and meetings
<input checked="" type="checkbox"/>	Local publishing in newspapers and newsletters (articles and reports)
<input checked="" type="checkbox"/>	State publishing in state magazines and journals (articles and reports)
<input checked="" type="checkbox"/>	National publishing in magazines, journals, and clearinghouses (articles and reports)
<input checked="" type="checkbox"/>	Internet—Web site
<input checked="" type="checkbox"/>	Television—local cable access channel
<input checked="" type="checkbox"/>	Radio interviews
<input checked="" type="checkbox"/>	Video presentation—tape, DVD, or online
<input checked="" type="checkbox"/>	Informational pamphlets, leaflets, and brochures
<input checked="" type="checkbox"/>	Funds in the budget?

Continuation Plan

Key Concepts

- Buy infrastructure and institutional knowledge with grant funds, not key staff.
- Include letters of support that specifically state how partners will support the project.
- Develop a clear plan to continue the project once funding runs out.
- Do not count on future grant funds to continue the project.

Checklist*—Continuation Plan

<input checked="" type="checkbox"/>	Commitments from applicant organization's leadership (Office of the Secretary)
<input checked="" type="checkbox"/>	Commitments from partners
<input checked="" type="checkbox"/>	Commitments from community stakeholders
<input checked="" type="checkbox"/>	Project structured so continuation cost is low (no grant-paid staff)
<input checked="" type="checkbox"/>	Train-the-trainer professional development model (trainers clone themselves)
<input checked="" type="checkbox"/>	Increase institutional capacity (does not cost much to continue)
<input checked="" type="checkbox"/>	Increase intellectual capital (does not cost much to continue)
<input checked="" type="checkbox"/>	No grant-paid worker bees (when the grant stops, the work stops)
<input checked="" type="checkbox"/>	Obtain expertise from consultants and contractors, not grant-paid employees

Key Personnel Bios

Key Concepts

- One page.
- Only relevant information.
- No job histories.
- No resumes unless requested.
- No two inch biographies.
- Be sure to state what position each staff member wil hold with regard to the project.

Checklist*—Key Personnel Bios

<input checked="" type="checkbox"/>	One page
<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Title or position
<input checked="" type="checkbox"/>	Education
<input checked="" type="checkbox"/>	Experience summary
<input checked="" type="checkbox"/>	Accomplishment summary

Appendix

Key Concepts

- When in doubt, leave it out.
- Include information the funder requests.
- Include only essential material.

Checklist*—Appendix

<input checked="" type="checkbox"/>	Grant funder's requirements
<input checked="" type="checkbox"/>	Observe page limit
<input checked="" type="checkbox"/>	Number consecutively all appendix pages
<input checked="" type="checkbox"/>	Key personnel bio sketches
<input checked="" type="checkbox"/>	Organization charts
<input checked="" type="checkbox"/>	Flow charts
<input checked="" type="checkbox"/>	Timeline
<input checked="" type="checkbox"/>	Letters of support (commitment)
<input checked="" type="checkbox"/>	Consultant and service contracts
<input checked="" type="checkbox"/>	Partner collaborative agreements
<input checked="" type="checkbox"/>	Survey instruments and compiled results
<input checked="" type="checkbox"/>	Focus group guidelines and compilation of results
<input checked="" type="checkbox"/>	Equipment technical specification sheets
<input checked="" type="checkbox"/>	Project advisory board member list
<input checked="" type="checkbox"/>	Tax-exempt letter
<input checked="" type="checkbox"/>	Organization's audited budget

Bibliography

Key Concepts

- Include only recent or landmark references.
- Do not include references you have not used in your proposal.

Checklist*—Bibliography

<input checked="" type="checkbox"/>	Recent only
<input checked="" type="checkbox"/>	Keep it short
<input checked="" type="checkbox"/>	Tell the truth, include a reference only if used
<input checked="" type="checkbox"/>	No URLs
<input checked="" type="checkbox"/>	Do not reference Internet sites—use title of work, author, and organization name

*Remember that a grant funder's directions (instructions/guidelines) take precedence over any and all other considerations. You must absolutely, positively follow the grant funder's directions exactly, precisely, and painstakingly.